

# 2017 VOLUNTEER TRAINING GUIDE

Thank you for volunteering for the IRS VITA (Volunteer Income Tax Assistance program). You will make a positive difference in the lives of many of our region's hardworking families.

## About Tax Volunteering:

ALL Volunteers must complete an application and pass 2 tests:

- 1) Volunteer Standards of Conduct Test (10 questions)
- 2) Intake/Interview and Quality Review Test (10 questions)

Tax Preparation Volunteers must also:

- 3) Learn TaxSlayer software, which is used for tax preparation at tax sites.
- 4) Pass Basic or Advanced Tax Certification Test (Complete sample tax returns and answer questions).

All tests are taken on the IRS LinkandLearn certification website which requires a username and password. This guide provides step by step instructions on training and certification process.

## Summary: Tax Program Training Requirements

**ENROLLMENT:** All volunteers must complete online independently:

- Complete (or update) Application (Volunteer Information Center)
- Volunteer Standards of Conduct Test
- Intake/Interview/Quality Review Test (*OPTIONAL for Tech Volunteers and Interpreters*)

### First and Second Year Volunteers

- Class 1: Tax Prep New Volunteers Part 1 (3 hour class)
- Class 2: Tax Prep for New Volunteers Part 2 (3 hour class)
- Basic Certification Test (3-6 hours-online)

### Returning Volunteers

- Class 3: Tax Slayer (2 hours- class or webinar)
- Advanced Certification Test (2-6 hours online)
- Optional: Advanced Tax Topics (2 hour classes)
- Optional: HSA, Military, Foreign Certification etc. (Online tests)

### Greeters

- Beginning Greeters (Greeters may complete enrollment after class) (2 hour class)

### Site Coordinators

- Class 3: Tax Slayer (2 hours class or webinar)
- Site Coordinator Meeting (3 hours meeting)
- Advanced Certification Test (2-6 hours online)/ HSA Certification Test (1 hour)
- Site Coordinator Test (1 hour)
- Optional Advanced VITA Topics (3 hours)

# Fort Sill Installation Tax Assistance Center:

## VITA TRAINING LINKS AND PASSWORDS

Date: \_\_\_\_\_

- 1) IRS' training and certification site [www.linklearncertification.com](http://www.linklearncertification.com).

Username \_\_\_\_\_

☐ VSOC

Password clue: \_\_\_\_\_

☐ Intake/Interview/Quality Review

☐ Basic/Advanced

☐ Specialty

- 2) **PracticeLab**- linklearncertification.com –or - <https://vita.taxslayerpro.com/IRSTraining>

Practice Lab Login Access: TRAINPROWEB

Username \_\_\_\_\_

Password clue \_\_\_\_\_

- 3) Volunteer Center for Scheduling: <http://www.makeworkpay.com/volunteercenter/>

Username \_\_\_\_\_

Password clue \_\_\_\_\_

- 4) Tax Preparation: <https://vita.taxslayerpro.com/>

TAX SITE \_\_\_\_\_

Username: \_\_\_\_\_

Password clue: \_\_\_\_\_

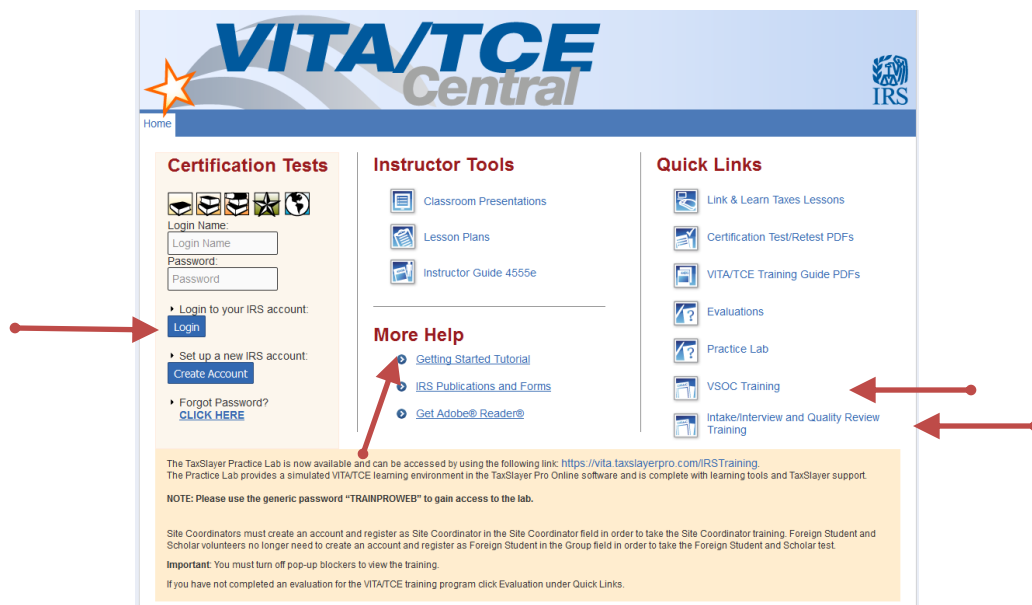
# 2017 VOLUNTEER TRAINING GUIDE

## Step by Step Guide

### Step 1: Enrollment

- 1.1 **Application:** If you have not yet completed a volunteer application for our Installation Army Volunteer Corps, please complete one at <http://www.myarmyonesource.com>: "[Volunteer Tools](#)"; [[Fort Sill](#), [Organization Group-JAG](#), [Tax Center](#)]
- 1.2 **Testing Platform:** Visit the IRS' training and certification site, called "Link and Learn" at <https://www.linklearncertification.com> Additional help on navigating Link and Learn for study and testing is in the Getting-Started-Tutorial on central panel of the page.

Under Certification Tests, **Create an Account** with Login and Password if you do not already have one. If you volunteered last year, your account will still exist and you can use the same login.



- 1.3 **Volunteer Standards of Conduct Test:** The Volunteer Standards of Conduct (VSOC) Exam is a prerequisite to all other courses. This information is mandatory for all VITA volunteers, and you may not proceed to any other exams until you pass this one. The Volunteer Standards of Conduct Summary is attached at the end of this booklet. The full document is available at the VSOC Training link on the left side of the Link&Learn portal page.

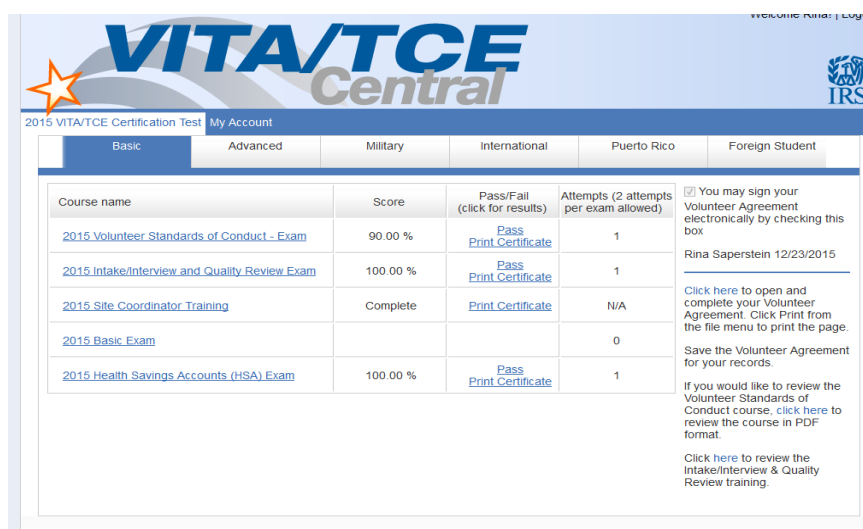
To take the VSOC Test: In the first column, under the heading "Course name," click on the link for Volunteer Standards of Conduct – Exam. This opens a description dialog box. Within this window, click Launch on the upper right to start the exam and complete

your Volunteer Standards of Conduct (VSOC) Test. *NOTE: As of this writing, the 2017-2018 tests are not yet available online. Do not take the 2016 test!!!*

- 1.4 **Intake/Interview and Quality Review Test:** Return to the IRS' training site VITA/TCE Central <http://www.linklearncertification.com> On the right side, view the powerpoint slideshow for Intake Interview and Quality Review.

To take the test: log in with your username and password at VITA/TCE Central [www.linklearncertification.com](http://www.linklearncertification.com). In the left hand column, select the "Intake Interview and Quality Review" Launch and take the Intake and Quality Review test. *NOTE: As of this writing, the 2017-2018 tests are not yet available. Do not take the 2016 test!!!*

For all tests, the test platform looks like this:



The screenshot shows the VITA/TCE Central website interface. At the top, there is a header with the VITA/TCE Central logo and the IRS logo. Below the header, there is a navigation bar with tabs for Basic, Advanced, Military, International, Puerto Rico, and Foreign Student. The Basic tab is selected. Below the navigation bar, there is a table with the following columns: Course name, Score, Pass/Fail (click for results), Attempts (2 attempts per exam allowed), and a checkbox for signing the Volunteer Agreement. The table contains the following data:

Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	<input type="checkbox"/> You may sign your Volunteer Agreement electronically by checking this box
<a href="#">2015 Volunteer Standards of Conduct - Exam</a>	90.00 %	Pass <a href="#">Print Certificate</a>	1	<input type="checkbox"/>
<a href="#">2015 Intake/Interview and Quality Review Exam</a>	100.00 %	Pass <a href="#">Print Certificate</a>	1	<input type="checkbox"/>
<a href="#">2015 Site Coordinator Training</a>	Complete	<a href="#">Print Certificate</a>	N/A	<input type="checkbox"/>
<a href="#">2015 Basic Exam</a>			0	<input type="checkbox"/>
<a href="#">2015 Health Savings Accounts (HSA) Exam</a>	100.00 %	Pass <a href="#">Print Certificate</a>	1	<input type="checkbox"/>

Below the table, there is a section for signing the Volunteer Agreement. It includes a checkbox for signing the agreement, a date (Rina Saperstein 12/23/2015), and links for opening and completing the agreement, saving the agreement, and reviewing the agreement.



*You have completed Step One and enrolled as a Tax Volunteer! Send us an email to let us know! Then move on to step 2.*

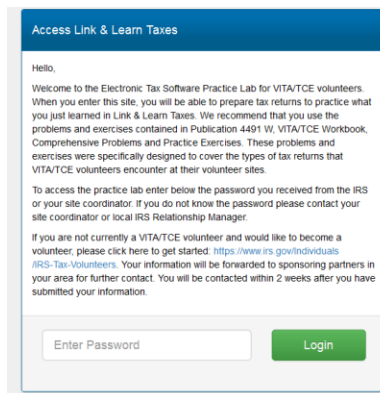
## **Step 2a: Tax Preparation Training for First and Second Year Volunteers**

If you have limited prior expertise with taxes, follow this Standard curriculum. If you have volunteered before or are an accounting student or financial professional, follow the Returning Volunteer curriculum below.

- 2a.1 **Attend two Tax Preparation classes.** The first class prepares you to file a simple federal tax return using the TaxSlayer software. The second class provides state tax information and additional common tax issues. You will also receive reference books and test materials in class.

Each class is 3 hours long. The classes are offered on 2 successive weeknights, 2 Friday mornings, or back to back on Saturdays. A training calendar is available online at [www.makeworkpay.com/volunteer](http://www.makeworkpay.com/volunteer) Please rsvp online or by email for the class of your choice.

- 2a.2 **Practice:** Use TaxSlayer Practice Lab <https://vita.taxslayerpro.com/IRSTraining> to practice the software and to complete tax returns for your test. The Access Code to Log in is TRAINPROWEB. This takes you to a page where you *set up a username and password* for the practice lab. There are lots of helpful videos and resources at this site.



- 2a.3 **Get ready to test:** Practice your tax knowledge by completing the Basic Tax Certification test in the test booklet (Pub 6744) and the TaxSlayer practice lab. This helps you identify topics where you need additional training. The test scenarios are designed to test your ability to apply tax law; they are often more challenging than returns you'll see a tax site.

When you identify trouble topics:

- Use your reference materials! The IRS Pub 4012, handed out at training class, is your best resource.
- Study that particular topic using the online video training library offered by the GPTC or AARP provides narrated tutorials for each type of tax.

information. Each video segment is approximately 15 minutes. Printable powerpoint versions are also available.

- Alternately, study using IRS' Link and Learn training site for individual interactive lessons on tax topics. (You do not need a password for these lessons.) The lessons will refer frequently to a written curriculum, Publication 4491, which is available in pdf form online; in each lesson there will be a link on the right of the screen which links to the appropriate pages in Publication 4491.
- Contact VITA Coordinator(s); we can answer easy questions and/or set you up with a training buddy to work through deeper problems.
- Attend an open practice session (schedule located on Memorandum For Record, Income Tax Assistance Center Special Duty Soldier Information).

2a.4 **Complete the alternate Basic Tax Certification Test in the test booklet.** Are you ready? If not, repeat step 2a.3.



*You have completed Step Two; you are ready to **take the Basic Certification Test!** Send us an email to let us know! Then move on to step 3.*

## **Step 2b: Advanced Training for Returning Volunteers**

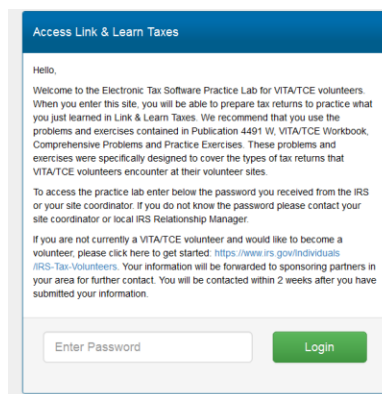
Experienced volunteers need to refresh their tax knowledge, pass the “Advanced” certification, and learn the tax software. We have NEW SOFTWARE since 2016!!! While there still might be a learning curve, we are excited about this more up-to-date and user-friendly software, called “TaxSlayer.”

Note: advanced certification is required for CPAs, CFAs and attorneys who want to receive professional continuing education credits (FS 2017 Continuing Education Credit Fact Sheet)

### **2b.1 Learn Taxslayer:** Taxslayer Class: Classroom training will be offered in weekdays.

This is also your opportunity to pick up reference materials such as the 4012 and the test booklet. A training calendar is available through email, please contact Sheila.s.olsen.civ@mail.mil for your copy. Please RSVP by email for the class or to be included on test days since seating might be limited, as well as availability of resources.

### **2b.2 Practice:** Use TaxSlayer Practice Lab <https://vita.taxslayerpro.com/IRSTraining> to practice the software and to complete tax returns for your test. The Access Code to Log in is TRAINPROWEB. This takes you to a page where you *set up a username and password* for the practice lab. There are lots of helpful videos and resources at this site.



Access Link & Learn Taxes

Hello,

Welcome to the Electronic Tax Software Practice Lab for VITA/TCE volunteers. When you enter this site, you will be able to prepare tax returns to practice what you just learned in Link & Learn Taxes. We recommend that you use the problems and exercises contained in Publication 4491 W, VITA/TCE Workbook, Comprehensive Problems and Practice Exercises. These problems and exercises were specifically designed to cover the types of tax returns that VITA/TCE volunteers encounter at their volunteer sites.

To access the practice lab enter below the password you received from the IRS or your site coordinator. If you do not know the password please contact your site coordinator or local IRS Relationship Manager.

If you are not currently a VITA/TCE volunteer and would like to become a volunteer, please click here to get started: <https://www.irs.gov/individuals/IRS-Tax-Volunteers>. Your information will be forwarded to sponsoring partners in your area for further contact. You will be contacted within 2 weeks after you have submitted your information.

Enter Password

### **2b.3 Reference Materials:** Pick up your reference materials at a class or through the VITA Coordinator located at Fort Sill ITAC, 4700 Mow Way Rd, Suite 400. (*Call first*):

- Fort Sill Installation Tax Assistance Center, 4700 Mow-Way Rd, Suite 400, Fort Sill, OK 73503 (580) 442-6445.

sheila.s.olsen.civ@mail.mil

You can also download 4 publications online: Publication 4491: Student Training Guide; Publication 4491-W: Comprehensive Problems and Exercises Workbook; Publication 4012: Volunteer Resource Guide; and Publication 17: Your Federal Income Tax Return

2b.4 **Refresh your tax knowledge** for certification.

- Study using Pub 4491, IRS LinkandLearn, YouTube Videos, all available online.
- You may also opt to take the Standard Training Class for beginning volunteers (see step 1 above).

2b.5 Attend optional **Advanced Topics Classes** to deepen your knowledge (see training calendar for dates)

- Affordable Care Act
- State and Multistate Returns
- Advanced Income Topics (includes Military, Self-employed [Uber, Avon etc.], and Debt topics).

2b.6 **Get ready to test:** Practice your tax knowledge by completing the AdvancedTax Certification test in the test booklet (Pub 6744) and the TaxSlayer practice lab. This helps you identify topics where you need additional training. The test scenarios are designed to test your ability to apply tax law; they are often more challenging than returns you'll see a tax site.

When you identify trouble topics:

- Use your reference materials! The IRS Pub 4012, handed out at training class, is your best resource.
- Study that particular topic using the online video offered by the IRS on YouTube provides narrated tutorials for each type of tax information. Each video segment is approximately 15 minutes. Printable powerpoint versions are also available.
- Alternately, study using IRS' Link and Learn training site for individual interactive lessons on tax topics. (You do not need a password for these lessons.) The lessons will refer frequently to a written curriculum, Publication 4491, which is available in pdf form online; in each lesson there will be a link on the right of the screen which links to the appropriate pages in Publication 4491.
- Contact VITA Coordinator(s); we can answer easy questions and/or set you up with a training buddy to work through deeper problems.
- Attend an open practice session (schedule TBA- contact us for dates).

2b.7 **Complete the alternate Advanced Tax Certification Test in the test booklet.** Are you ready? If not, repeat step 2b.6.



*You have completed Step Two; you are ready to **take the Advanced Certification Test!** Send us an email to let us know! Then move on to step 3.*



## **Step 2c: Training for Specialty Volunteers**

For specialty volunteers, scheduling is done separately– please contact VITA Coordinator for details.

- **Greeters:** should complete the Enrollment Section (step 1) above to have an understanding of the tax site process. For first and second year trainers, a two hour Greeter class is offered in person.  
You do not need to study and certify in tax law, (Step 2) but it is very helpful if you do.
- **Interpreters:** should complete the Enrollment Section (step 1) above to have an understanding of the tax site process.

*Thank you for becoming a Tax Volunteer! Celebrate, tell your friends, post it on facebook, and send us an email to let us know!*

## **Step 2d: Site Coordinators**

Site Coordinators should follow the returning volunteer process above. You must certify at Advanced Level, and should pass the HSA Certification as well. You are also required to pass the Site Coordinator Certification through IRS. The Advanced VITA Topics Classes are also designed to support you.

- A Site Coordinator Training offered by IRS as Webinar will be offered.
- Site Coordinator meetings will be held in January to go through all administrative and support functions.
- Documents and forms for Site Coordinators from IRS are at <https://www.irs.gov/individuals/site-coordinator-corner>

## **Step 3: Testing and Certification**

### 3.1. IRS Volunteer Certification uses the **Link and Learn Central Testing Site**

<https://www.linklearncertification.com>.

- Volunteers in their first and second year should take the Basic Test.
- Experienced volunteers, tax professionals, CFAs and other seeking CEUs, and ambitious 2nd year preparers should take the Advanced Test.

Each certification test requires the volunteer to complete a tax return and answer questions based on the results. The test is open book and is not timed. The tests are split up by level- Basic and Advanced. The test scenarios are designed to test your ability to apply tax law; they are often more challenging than returns you'll see a tax site.

**Test tips:** Take your time and use your reference materials. This test is not about memorization but about your ability to research and apply information. *If you have completed the test in the test booklet in steps 2 or 3 above, will be entering the answers into the test software.*

You can take the practice test as often as you like, but it is not an applicable test for certification.

Additional information about moving through the test screens online is available in the "Getting Started Tutorial" listed in the bottom center panel of the link and learn site.

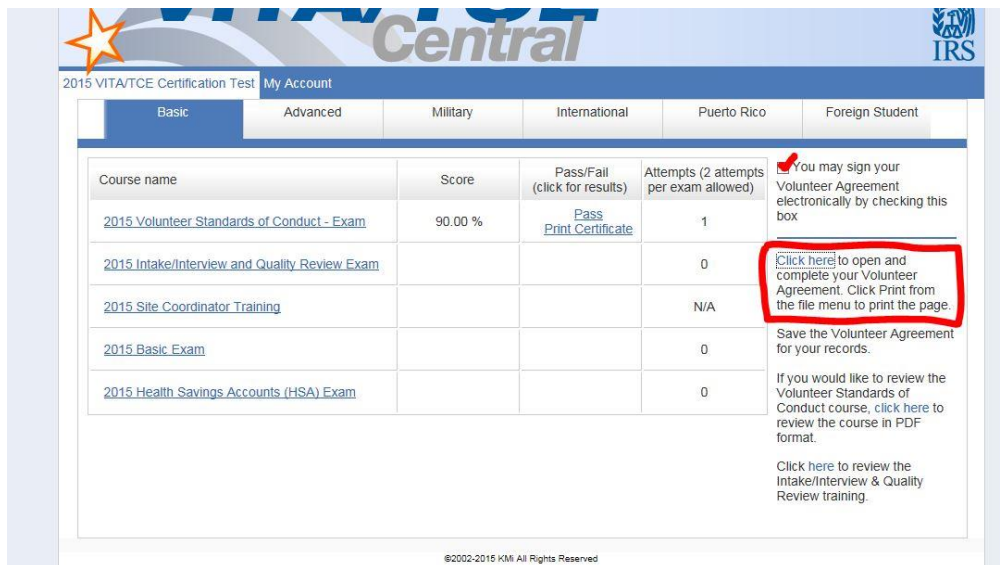
Each test can be taken up to two times. If you fail the test the first time, look over the test summary, which will tell you the areas you answered incorrectly. You can study these in Link and Learn before taking the test again. If you fail a second time, switch from the advanced to the basic test or from basic to advanced.

### **3.2. Take the test:**

- Sign on to the test at the Link and Learn Testing site.
- Select the appropriate exam in the first column of the screen; a new box will open up. Then click Launch.
- Enter the answers to the test questions using the returns you have completed. Be sure to read the test on the screen- sometimes question and answer order can differ from the information in the test booklet.
- After clicking Submit, the Certification Test Results screen will be displayed. On this screen, you can view:
  - Your total score for the exam (at the bottom of the screen). The passing score is 80%.
  - The result for each question.
  - Feedback for incorrect questions, along with links to the Link & Learn Taxes lesson with the information needed to answer the test question. This is your personalized review lesson; use these links to study specific content as needed.

After you complete your tests, your certification screen will update to show that you are certified as a tax preparer. You can return to this screen at any time to pull up documentation on which tests you have taken.

- 3.3 Complete the Form 13615, Volunteer Agreement, shows that you have passed all tests and agree to the rules of the program. On the left side of the certification page, click the check-box next to the statement, “You may sign your Volunteer Agreement electronically by checking this box.” Now **open and print the volunteer agreement form**. This form documents each test that you have passed; you should bring it with you to the tax site each time you volunteer.



2015 VITA/TCE Certification Test My Account

Basic	Advanced	Military	International	Puerto Rico	Foreign Student
Course name	Score	Pass/Fail (click for results)	Attempts (2 attempts per exam allowed)	<input checked="" type="checkbox"/> You may sign your Volunteer Agreement electronically by checking this box <a href="#">Click here to open and complete your Volunteer Agreement. Click Print from the file menu to print the page.</a> Save the Volunteer Agreement for your records. If you would like to review the Volunteer Standards of Conduct course, click here to review the course in PDF format. Click here to review the Intake/Interview & Quality Review training.	
<a href="#">2015 Volunteer Standards of Conduct - Exam</a>	90.00 %	<a href="#">Pass Print Certificate</a>	1		
<a href="#">2015 Intake/Interview and Quality Review Exam</a>			0		
<a href="#">2015 Site Coordinator Training</a>			N/A		
<a href="#">2015 Basic Exam</a>			0		
<a href="#">2015 Health Savings Accounts (HSA) Exam</a>			0		

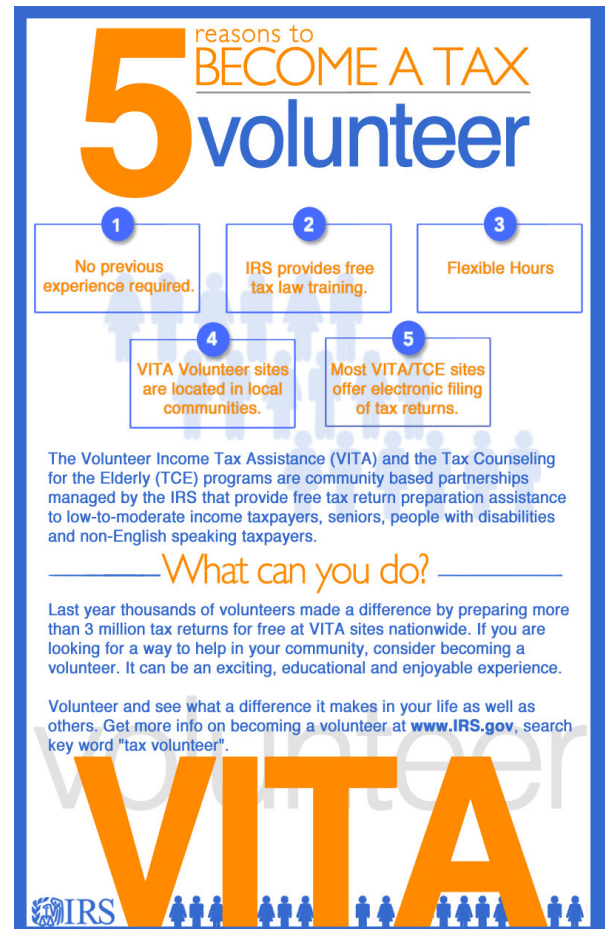
©2002-2015 KMI All Rights Reserved



*You are a certified tax preparer! Celebrate, tell your friends, post it on facebook, and send us an email to let us know!*

## **Step 4: Schedule**

Please submit dates and times available to the VITA Site Coordinator ASAP to ensure a workstation and appropriate duties are available.



**On tax day: Please arrive 20 minutes prior to the start of the tax session. Bring:**

Photo ID must be on your person at all times to include name badge for ITAC.

- Your workbooks and handouts from training sessions.
- Form 13615 (volunteer agreement and certification) that you printed out from Link and Learn after certification.

**Bad weather:** If heavy snowstorms are expected, dial 2-1-1 to find out if your tax site will be open.

**Cancellation:** If you are scheduled and must cancel, please contact the site coordinator.

# VITA/TCE Volunteer Standards of Conduct – SUMMARY

For detailed information and examples, please see [IRS Pub 4961](#)

## **As a volunteer in the Volunteer Income Tax Assistance (VITA) Program, you must:**

### **1. Follow the 10 Quality Site Requirements (QSR).**

QSR #1. **Certification** All VITA volunteers must pass the Volunteer Standards of Conduct test. Volunteers who answer tax law questions, prepare or correct tax returns, conduct quality reviews and/or instruct tax law classes, must pass **Intake/Interview & Quality Review test** and **Basic Certification** or **Advanced Certification** or equivalent Circular 230 test.

QSR #2. **Intake and Interview/Quality Review Process** Sites must use the Form 13614-C, Intake/Interview & Quality Review Sheet and must complete an interview with the taxpayer for every return prepared. All returns must be quality reviewed and discussed with the taxpayer by a designated reviewer or by peer-to-peer review.

QSR #3. **Confirm Photo Identification and Taxpayer Identification Numbers.** Validate identities using photo identification for primary and secondary taxpayers and social security numbers or individual taxpayer identification numbers for everyone listed on the tax return. Married filing jointly taxpayers must both be present at the site unless there is a valid power of attorney.

QSR #4. **Reference Materials** Sites must have reference materials Pub 4012; Pub17 available online or in print.

QSR #5. **Volunteer Agreement:** All volunteers must agree to Volunteer Standards of Conduct, certified annually by signing and dating Form 13615 prior to working at a site.

QSR #6. **Timely Filing:** Sites must ensure that returns are electronically filed or delivered to the taxpayer in a timely manner.

QSR #7. **Civil Rights:** Civil Rights Act of 1964 Title VI information must be displayed or provided to taxpayers. Treat all taxpayers with equal respect and care without discrimination on the basis of race, color, national origin, limited English proficiency, disability, sex, age, etc.

QSR #8. **Site Identification Number (SIDN) and**

QSR #9. **Electronic Filing Identification Number (EFIN):** The correct SIDN and EFIN must be reported on all returns prepared at your site.

QSR #10. **Security, Privacy and Confidentiality:** Protect the physical and electronic data. Keep all taxpayer and tax return information confidential. You may discuss information with other volunteers at the site, but only for purposes of preparing the return, and not within hearing of other taxpayers. Protect client identification numbers, user names, and passwords used at the site. See [Publication 4299](#), "Privacy, Confidentiality and Civil Rights: A public trust" for additional details.

2. Do not accept payment, tips, gifts, solicit donations, or accept refund payments for tax return preparation. We do not accept compensation for our services. VITA sites should only request direct deposit of a taxpayer's refund into accounts bearing the taxpayer's name.

3. Do not use taxpayer information for your personal or business use. Do not solicit business from taxpayers you assist. Do not use the knowledge you learn about them for any direct or indirect personal benefit for you or any other individual.

4. Do not knowingly prepare false returns. Ask yourself if information is unusual or questionable. Correctly apply tax law to the taxpayer's situation. While you may feel uncomfortable questioning the taxpayer, or may be tempted to bend the law to help a taxpayer, underreporting income or claiming ineligible expenses, dependents or credits will cause serious problems for the taxpayer and for VITA. Be cautious to protect against identity theft by confirming identities and securing data.

5. Do not engage in criminal, dishonest, notoriously disgraceful conduct, or conduct deemed to have a negative effect on the VITA program.

6. Treat all taxpayers in a professional, courteous, and respectful manner. Volunteers take pride in assisting the people who come to us for return preparation. Taxpayers are often under stress and may wait extended periods for assistance. Volunteers also experience stress due to the volume of taxpayers needing service. It is important to remain calm and create a peaceful and friendly atmosphere. Provide accommodation for disabilities and language so that everyone can take advantage of the program.

## Volunteer Standards of Conduct Summary (Continued)

**Exercise Due Diligence.** When preparing or reviewing a tax return, do your part to ensure the information on the return is correct and complete. Exercise reasonable care to confirm a taxpayer's identity. Provide top-quality service by helping taxpayers understand and meet their tax responsibilities.

Generally, IRS volunteers may rely in good faith on information from a taxpayer without requiring additional documentation as verification. However, due diligence requires that you ask yourself whether the information is unusual or questionable, and ask a taxpayer to clarify information that appears to be inconsistent or incomplete.

***Volunteers must remind taxpayers that when they sign the return or authorize e-file, they are stating under penalty of perjury that the return is accurate to the best of their knowledge.***

**Make an effort to find the answer.** When in doubt, *don't guess*:

- Check your reference publications (i.e. Publication 17, Publication 4012, Publication 596, etc.)
- Research [www.irs.gov](http://www.irs.gov) for the answer
- Research the [Interactive Tax Assistance](#) (ITA) to address tax law qualifications
- **Seek assistance from a tax preparer with more experience**
- **Seek assistance from the Site Coordinator**
- Contact the VITA Hotline at 1-800-829-8482
- Reschedule/suggest the taxpayer come back when a more experienced tax preparer is available
- Advise the taxpayer to seek assistance from a professional tax preparer.

***If at any time you become uncomfortable with the information and/or documentation provided by a taxpayer, whether because you suspect the information is untrue or because it is beyond your knowledge and training, you should not prepare the tax return.***

***This is your right and your responsibility.***

### Non-Compliance

A volunteer who violates these standards will be placed on a registry that bars the person from participation in VITA/TCE programs. A person who willfully aids or assists in, procures, counsels or advises the preparation or presentation of a materially false or fraudulent return can be subject to criminal punishment.

### What if I suspect an unethical situation at a tax site?

Report any violations that raise substantial questions about the site or a volunteer's honesty, trustworthiness, or fitness as a tax preparer. Start with the Site Coordinator. If you feel they are a part of the problem, report to the regional coordinator.

### Volunteer Protection Act

The Volunteer Protection Act of 1997 which protects volunteers from liability for acts they perform within the scope of their responsibilities. If you are working within your training and certification and adhering to these Volunteer Standards of Conduct, you are acting under the Volunteer Protection Act.

**THANK YOU FOR  
VOLUNTEERING!**

## 2017 VITA CLASSES

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### CLASS 1

**Tax Prep Part 1 for New Volunteers**  
*Preparing a basic Federal return using Taxslayer*

TEST OUT: Certify Basic using Taxslayer to complete 2 returns.

Scheduling and working a tax site  
 Using reference materials  
 Interviewing taxpayers/Intake Form  
 Complete a basic federal 1040 in Taxslayer:  
     IRS Rules on names  
     Filing Status  
     All those relatives (dependents and credits)  
     W2 and SSA1099 Income  
     Standard Deduction  
     Earned Income Credit  
     Affordable Care Act (1095B&C)-full year coverage

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### Class 2

**Tax Prep Part 2 for New Volunteers**  
**State and Applied Tax Preparation**

PRE-REQUISITE: Class 1  
 TEST OUT: Certify Basic using Taxslayer to complete returns including state filings.  
 Taxslayer

Complete state returns in Taxslayer  
     Oklahoma Active Duty, Retiree, and MSRRRA  
 Multiple State due to difference of Residence between spouses.  
     Retirement Income 1099R  
     1099Misc/Contract Employees- Simple schedule C  
     Gambling, Unemployment, Interest and Dividends  
     Cancellation of Debt- Credit Card  
 Schedule A Deductions  
 Affordable Care Act Exemptions  
 Efile Prep for Quality Review (Consents/Bank info)  
 Certification test taking tips/reference materials

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### Class 3 : TaxSlayer

#### TaxSlayer Software

*For experienced preparers.*  
*Software only- does not teach tax law.*  
*Bring your 4012!*

TEST OUT: Certify Advanced using taxslayer Including state filings

Navigation , Military (Active Duty, Reserve, National Guard)  
 Starting and returning to a return Personal info, status, dependents Income, adjustment, deductions, credits  
 Affordable Care Act  
 Completing a State Return  
 Efile Prep for Quality Review  
 Quality Review in Taxslayer  
 Prior Year and Amended Returns

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### Advanced VITA TOPICS

Class 4: Affordable Care Act in Depth  
 Class 5: Multistate tax returns  
 Class 6: Special Topics

These are 2 hour topic meetings  
 Exemptions and Tax Credit Reconciliations  
 Non-Resident Returns  
 Self-employed Uber and other issues

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## Additional and Specialty Courses

<i>Type</i>	<i>Curriculum Includes</i>
<b>Info Session (1 hour)</b> <i>No Pre-Requisites</i> <i>Optional; Audience: Prospects</i>  <i>At least 6 times (December)</i>	Why VITA What happens at a tax site/roles Skills needed coming in Times and Places Collect Materials, login, password Training Protocol
<b>Beginner Greeter Training (2 hours)</b> <i>No Pre-Requisites</i>	Volunteer Standards of Conduct Using a check in sheet Intake/Interview Reviewing Paperwork Accepted Documents (SS, ID Card) Scope/Basic/Advanced Managing the waiting/appointment list Referring to other sites (Out of Scope) Frequently asked questions
<b>State Intensive (6 hours)</b>  <i>Pre-Requisite: Certification</i> <i>1x</i>	State details for advanced and site coordinators Oklahoma and Mixed State
<b>Site Coordinators Meeting (3 hours)</b>  <i>Prerequisite: Tax Law Certification</i> <i>Site Coordinator Certification</i>  <i>1x</i>	TaxSlayer Profiles TaxSlayer Tags, Flags, Status TaxSlayer Consents TaxSlayer Rejects and Acknowledgements Special state issues in TaxSlayer Using volunteer software Using intake survey Referring to other tax sites
<b>Quality Reviewer (4 hours)</b>	Proper Identification, Power of Attorney Names, SSNs, ITINs, and EINs were verified Filing Status Verified, Personal and Dependency Exemptions entered correctly, All income have source documents, All credits properly reported, Direct deposit/debit information is correct. Taxpayer advised they are responsible for the information on their return.
<b>Practice Sessions</b>	Taxslayer practice sessions Certification Test Study sessions